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Praise for *Analytics Across the Enterprise*

“Few major high-tech companies eat their own dog food. But give IBM credit: It practices what it preaches. This book provides an inside look at how IBM has applied analytics to nine business functions, the lessons it has learned, and the value it has derived. This book is valuable for anyone in a large company who wants to know how to apply analytics profitably.”

—Wayne Eckerson, Principal Consultant, Eckerson Group, and author, *Secrets of Analytical Leaders: Insights from Information Insiders*

“*Analytics Across the Enterprise* shows how even the most complex enterprise can transform itself with analytics. A powerful collection of real-world projects shows that using analytics to improve decisions, especially operational decisions, drives efficiency and innovation. The stories in this very readable book show the importance of actually taking action, not just developing insight; of caring about the end user context, not just the model; of gaining buy-in and managing organizational change; and much more. A great guide for anyone transforming their own organization with analytics.”


“*Analytics Across the Enterprise* is the only book on analytics written by three world-class experts ‘standing on the shoulders of a giant’ analytics powerhouse: an impressive first-hand account of nine breakthrough analytic journeys from 70 top executives and practitioners, the largest private math department in the world, and a leading consulting think tank. This is an unprecedented tour de force showing how a best-of-breed analytics company revolutionized its own business model.”

—Gonçalo Pacheco de Almeida, Associate Professor of Strategy, Head of the Business Analytics Initiative, and Academic Director of the MBA Strategy Specialization, HEC Paris Business School and the French National Scientific Research Center–HEC Lab
“A thoughtfully written collection of stories from within IBM, with proven techniques that are valuable for all current and future business leaders. IBM has been doing analytics since before it was ‘cool’ and, for the first time, shares an inside look at the very pragmatic, inspiring approach complete with lessons learned. Analytics Across the Enterprise not only changes the game, it explains how to win.”

—Lawrence G. Singleton, PhD, CPA, Dean, School of Management, Professor of Accounting and International Business, Marist College

“Organizations are awash in data. Many have transformed this data into information, yet few have identified patterns of insight from this information. A rare number of organizations can take the insight to action, but even fewer can create a pathway from data to decisions. In Analytics Across the Enterprise, Dietrich, Plachy, and Norton definitively chronicle what it takes to apply big data and analytics in the transformation of enterprises. The results: Successful leaders create competitive advantage in smarter workforces, optimized supply chains, and predictable sales performance. Organizations will learn how to move not only from gut-feel intuition but also to powerful fact-based decision making.”

—R “Ray” Wang, Principal Analyst and Founder, Constellation Research, Inc.

“The growing demand for analytics is a priority for business and IT to collaborate on the processes and technology required to gain the insights to guide organizations to be effective. This book helps organizations gain a perspective on what operating analytics across the enterprise is all about and most importantly why it is crucial across lines of business where the outcomes can be achieved from making continuous investments.”

—Mark Smith, CEO and Chief Research Officer, Ventana Research
“Glimpses of the IBM vision of the future for analytics have regularly appeared in the literature, and now for the first time we have a comprehensive inside account of how IBM uses advanced analytics to compete globally. Using examples from many functions (HR, marketing, finance, supply chain), this book provides a fascinating view of IBM as an intensively data-driven corporation. Senior executives familiar with analytics and data applications will find many ideas in this book on how they can harness analytics to improve their corporation’s performance. Executives less familiar with analytics may experience some ‘shock and awe’ in reading how far data- and analytics-driven corporations have progressed and what formidable competitors they have become.”

—Peter C. Bell, Professor, Management Science, Ivey Business School at Western University

“Analytics Across the Enterprise is a live chronicle of how the practice of analytics transcends the business functional boundaries and how it benefits all the business functions.”

—Dr. Adam Fadlalla, Associate Dean for Academic Affairs and Professor of Information Systems, College of Business and Economics, Qatar University

“The use of data and analytics to generate value is a journey for all organizations: a journey of technology, operational self-awareness, and culture. The joy and challenge of data and analytics is that it is difficult, and as such, it is a source of sustainable competitive value. This book tells the story of the journey of adoption of analytics for IBM and how we became a company driven by data and analytics. It explores the technical and mathematical complexities of the journey, the different business use cases, and the value it delivered to our clients, our employees, and our shareholders.”

—Fred Balboni, Global Managing Partner, Strategy and Analytics, Global Business Services, IBM Corporation
Analytics Across the Enterprise
For the many pioneers at IBM who are breaking new ground to realize business value from big data and analytics.
Contents

Foreword  xix
Preface  xxii

Chapter 1  ■  Why Big Data and Analytics?  1
Why IBM Started an Enterprise-Wide Journey to Use Analytics  3
Big Data and Analytics Demystified  4
  Descriptive and Predictive Analytics  5
  Prescriptive Analytics  6
  Social Media Analytics  6
  Entity Analytics  7
  Cognitive Computing  7
  Big Data  8
Why Analytics Matters  9
Governance  10
Proven Approaches  12
Gauging Progress  13
Overview of Nine Journeys  14
Emerging Themes  15
How to Use This Book  17
Endnotes  18
Chapter 2 ■ Creating a Smarter Workforce 21

Perspective: Applying Analytics to the Workforce 21

Challenge: Retaining High-Value Resources in Growth Markets 25

Outcome: Attrition Rate Declined; Net Benefits Exceeded Expectations 26

Challenge: Gaining an Accurate View of What Employees Are Thinking 26

Outcome: Ability to Act on Real Insights About Employees 27

Lessons Learned 29

Endnotes 31

Chapter 3 ■ Optimizing the Supply Chain 33

Perspective: Applying Analytics to the Supply Chain 33

Challenge: Detecting Quality Problems Early 36

Outcome: Significant Cost Savings, Improved Productivity, Improved Brand Value, and Two Awards 38

Challenge: Providing Supply/Demand Visibility and Improved Channel Inventory Management 39

Outcome: Reduced Price Protection Expense, Reduced Returns, and Two Industry Awards 41

Challenge: Improving the Accounts Receivable Business Process and Collector Productivity 41

Outcome: Better Visibility to Track the Total Receivables View Across the Entire Collection Process and Reduction in Labor Cost 43

Challenge: Predicting Disruptions in the Supply Chain 43

Outcome: Number of Listening Events Increased Tenfold and Local Language Listening Proved Valuable 44

Lessons Learned 45

Endnotes 48

Chapter 4 ■ Anticipating the Financial Future 51

Perspective: Big Data and Analytics Increase Value of Finance Team 51

Getting the Basics in Place 52

Creating an Analytics Culture 53
Challenge: Attaining Operational Efficiency, Managing Risk, and Informing Decisions 55

Tracking Spending: The Worldwide Spend Project 55
Outcome: More Efficient and More Effective Spend Forecasting 57
Keeping Up with Reporting Requirements: The Accelerated External Reporting (AER) System 58
Outcome: Improved Statutory and Tax Reporting and Analytics 59

Challenge: Balancing Risk and Reward 59
Country Financial Risk Scorecard 59

Challenge: Validating Acquisition Strategy 62
The Mergers and Acquisitions Analytics Project 62
Outcome: Mergers and Acquisitions Analytics Improves Success Rate 62
The Smarter Enterprise Enablement (SEE) Initiative 64
Outcome: SEE Project Transforms Strategic Planning and Its Novel Approach Leads to Patent Applications 64

What’s Next for IBM Finance? 64
Lessons Learned 65
Endnotes 66

Chapter 5 ▪ Enabling Analytics Through Information Technology 67

Perspective: Applying Analytics to IT and Enabling Big Data and Analytics Across an Enterprise 67
Challenge: Deciding When to Modernize Servers 69
Outcome: Increase in Application Availability 70

Challenge: Detecting Security Incidents 71
Outcome: Increased Detection of Security Incidents 71

Enabling the Transformation to a Smarter Enterprise 71
Developing Enterprise-Wide Big Data and Analytics Applications 71
Partnering with Business Areas to Develop Social Media Analytic Solutions for Customer-Centric Outcomes 73
Developing an Information Agenda and Processes for Governance and Security of Data 73
Providing a Big Data and Analytics Infrastructure 76
Chapter 6  ■  Reaching Your Market  81

Perspective: Using Analytics to Reach and Engage with Clients  81

A Signature Client Experience  83
Marketing-Related Analytics Hiring Soaring  84
Agility Is Key  84

Challenge: Developing the Data Foundation and Analytics Capability to Enable a Signature Client Experience  85

Outcome: Individual Data Master to Provide Client-Level Insights  87

Challenge: Providing a Real-Time View into Effectiveness of Marketing Actions: Performance Management  87

Outcome: Marketing Efficiencies Realized and Transformation of Marketing Enabled  88

Challenge: Going Beyond Correlation to Determine Causal Effects of Marketing Actions  90

Outcome: System Deals with Special Terms and Conditions Added Grew from 67% to 98% over Three Quarters  90

Challenge: Tapping into Analytics Passion to Provide New Insights to Inform IBM’s Digital Strategy  92

Outcome: Insights from Diverse Teams Provided the Evidence Needed to Make Changes to the Digital Strategy  93

Lessons Learned  94

Endnotes  94

Chapter 7  ■  Measuring the Immeasurable  97

Perspective: Software Development Organization Optimizes the Highly Skilled Workforce  97

Challenge: Creating a Common View of Development Expense to Enable Decision Making  99

Development Expense Baseline Project  99

Outcome: Development Expense Baseline Project Proves That the Immeasurable Can Be Measured  105

Lessons Learned  105

Endnotes  106
Chapter 8  ■  Optimizing Manufacturing  107

Perspective: Applying Analytics to Manufacturing and Product Management  107
Challenge: Scheduling a Complex Manufacturing Process in a Semiconductor Fab  108
   Outcome: Reduced Production Times  111
Challenge: Enhancing Yield in the Manufacturing of Semiconductors  111
   Outcome: Cost Savings Due to Yield Improvement  112
Challenge: Reducing the Time to Detect Aberrant Events  113
   Outcome: Engineers Take Action  114
Challenge: Simplifying the Hardware Product Portfolio  115
   Outcome: Significant Reduction of Hardware Product Portfolio  116

Lessons Learned  117
Endnotes  117

Chapter 9  ■  Increasing Sales Performance  121

Perspective: Using Analytics to Optimize Sales Performance—Inside and Out  121
   How IBM Approached Leveraging Analytics in Sales Organizations  122
   Using Analytics to Build a Business Case for Inside Sales  123
Challenge: Deploying Sellers for Maximum Revenue Growth by Account  124
   Outcome: Increased Sales Performance  126
Challenge: Deploying Sellers Within a Territory  126
   Outcome: Increased Territory Performance  127
Challenge: Determining the Optimal Sales Coverage Investment by Account  128
   Outcome: Increased Revenue and Increased Productivity  130
Online Commerce  130
Challenge: Creating a Smarter Commerce B2B Solution to Drive Cross-Company Efficiencies  132
   Outcome: An Analytics-Based, Client-Focused Business Case Wins Approval  133
Chapter 10 ■ Delivering Services with Excellence 139

Perspective: Leveraging Analytics in a Services Business 139

Challenge: Developing New Business 141

Outcome: Increased Signings, Revenue, and Pipeline 142

Challenge: Predicting Risk of Contracts 142

Outcome: Deployment of Financial Risk Analytics 143

Challenge: Optimizing Workforce Performance 143

Outcome: Large Cost Savings, Improved Productivity, and Faster Client Response Times 147

Challenge: Getting Early Warning About Problems 147

Outcome: Timely Intelligence to Delivery Teams to Help Satisfy Clients 148

Lessons Learned 148

Endnotes 149

Chapter 11 ■ Reflections and a Look to the Future 151

The Journey Continues 151

Reflections 153

Transactional Data 155

Simulation 156

Alerts 157

Forecasting 158

The Future 159

Growth of Data 160

Unstructured Data 161

Cognitive Computing 163

Endnotes 164

Appendix A ■ Big Data and Analytics Use Cases 165

Glossary ■ Acronyms and Definitions of Key Big Data and Analytics Terms 175

Index 183
Like many of our clients, IBM® itself is focused on becoming a smarter enterprise. Connected people, integrated processes, and instrumented data: These form the foundation for “smarter.” A smarter enterprise makes decisions differently, creates value differently, and delivers value differently…and it all starts with the creative application of analytics.

In my conversations with clients about transformation, they often ask how IBM has approached analytics. Where should we get started? What are you doing inside IBM? What advice would you offer from your experience so far?

To help answer these questions for clients, our analytics practitioners inside IBM collaborated to develop this book. IBM has moved aggressively the past several years to build our analytics capabilities—through hiring talent, developing software, and acquiring firms with analytics tools that enhance our portfolio. IBM itself has been the alpha and beta for the deployment of these new technologies across our operations—from how we manage finance and marketing to how we optimize our supply chain and attract, retain, and develop talent. Indeed, we’ve found that in virtually every aspect of your organization, you can make smarter, more informed decisions by embedding analytics into how you do business.

I hope you will find our experience relevant and useful as you consider how to best seize on the power of big data, the world’s newest natural resource for competitive advantage. Progressive leaders are putting big data to work in fields ranging from finance to farming, from presidential politics to professional sports. It’s not just the data; it’s the insights gained from analyzing data that give organizations an edge over the competition.

As I tell clients, transformation is hard; it takes ongoing commitment and leadership from the top of the organization. But if there’s one truth I’ve learned about transformation over the years, it’s that you should always move
faster than you think you should. That’s the only way to stay ahead of today’s unrelenting pace of change.

This principle holds true for the adoption of analytics, the centerpiece of the next wave of our transformation. Don’t wait for your data to be perfect. The time to start on this journey is now...and we hope our own experience at IBM will help you accelerate the benefits that accrue when you unlock the hidden value and power of your data.

—Linda Sanford
IBM Senior Vice President, Enterprise Transformation
Preface

The genesis for this book came when Doug Dow, Vice President, Business Analytics Transformation, observed that a number of good analytics books were being published, written by experts in analytics, and that IBM had experts with significant experience solving business problems by applying analytics. Dow approached Brenda Dietrich, an IBM Fellow and an eminent operations research and analytics expert. Dietrich was receptive to the idea but was reluctant to sign up to write the book alone. Dow later approached two of his Business Analytics Transformation department members, Emily Plachy and Maureen Norton, who both jumped at the chance to tell IBM’s story. Another motivation for the book is that Dow receives frequent requests from clients to learn how IBM is using analytics to elevate business results, so we know that IBM’s story is of interest.

As we embarked on the journey to write this book about analytics, we were mindful of the rising tide of materials touting the value of analytics. So what would cause someone to cast his or her net and catch this one? Would a book about the challenges and triumphs, to continue the analogy, of one of the largest global ships on the sea have insights and lessons that others could benefit from, or at least find entertaining enough to read? We decided that this is a story that needed to be told. We decided that C-level executives in Fortune 500 companies, small business owners, and MBA students and faculty would see themselves and their challenges on these pages, and we needed to write this book. Introducing readers to a wide spectrum of ideas about how analytics is much more than a technology and instead is a smarter way of doing business would be reason enough to sail forward.

When we started planning for the book, we decided to organize it by business function. We identified analytics projects within a business function that were realizing value. Next, we interviewed the key members on the
projects. Then, one of the authors volunteered to be the lead writer for that chapter.

We authors made heavy use of IBM Connections, IBM’s collaborative software, to interact as we wrote the book, creating a Connections Activity for the book, organized by chapters. During reviews, we added Connections Folders and Files, which helped us keep track of the many reviews and versions of each chapter. With three authors working in different locations, efficient collaboration was essential.

As the writing journey progressed, a common phrase kept coming into our conversations: “All roads lead to the book.” The book became a seminal part of our work, feeding and enriching every aspect of our day jobs. We were able to leverage insights from the work to improve insights and results, effect connections between teams that were tackling similar problems, and help other transformation teams tell their stories.

Another very exciting aspect to this book is that we wanted it to be useful to the business leaders of today and tomorrow; reaching students and faculty is a high priority. During the development of the book, two of the authors, Maureen and Emily, developed and taught an innovative three-day pilot workshop at a premier MBA program in Europe, HEC University. Working with Dr. Hammou Messatfa, Technical Leader, European Government Industry, IBM Sales and Distribution, they held a very successful big data and analytics workshop, which led to additional analytic educational initiatives. Just as the book was in the final editing stages, Maureen had the opportunity to teach at a big data and analytics workshop for MBA students in the Middle East as well.

Color Images

PDFs of the color images for this book can be downloaded from the companion website. Go to www.ibmpressbooks.com/title/9780133833034 and click the Downloads tab.
Acknowledgments

The stories in this book, detailing IBM’s use of analytics to transform processes and results, could not have been told without the time, talent, and cooperation of many people. Some have been quoted in the chapters or referenced in endnotes, but many more helped along the way. We thank Ross Mauri and Doug Dow, whose enthusiasm and executive support of this project made it possible. We interviewed more than 70 people, including executives and practitioners, and we worked with staff members, communications professionals, editors, and more from the teams. We are very grateful to the people mentioned below for telling us their stories and contributing to this book.

*Foreword:* Linda Sanford, Tim Ensign  
*Chapter 1:* Doug Dow, Jeff Jonas, Ross Mauri  
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Chapter 10: Cesar Berrospi, Jack Bisceglia, Odellia Boni, Greg Dillon, Daniel D’Elena, Sherif Goma, Joe Haugslund, Abdel Labbi, Sergey Makogon, Gregory Westerwick, James Williams

In addition to these people, several others added to the stories in meaningful ways during their review: Jonathan Correnti, Patrick Gibney, Mark Harris, and Ruth Manners. Greg Golden provided valuable guidance and support to get us started. We would also like to thank Steven Stansel and Ellice Uffer from IBM Press for their early encouragement and ongoing support and Mary Beth Ray and the many others from Pearson Education who improved the book and brought it over the finish line. We would like to thank Doug Dow, who read each chapter numerous times, providing valuable feedback. Each of us also owes a debt of gratitude to our families. Writing this book involved many nights, weekends, holidays, and “vacations.” Brenda is grateful for the support and uninterrupted writing time that Peter, Joshua, Monica, Ingrid, and Irwin accommodated. Emily treasures the support and keen interest in “the book,” as well as the detailed, constructive feedback for one of the chapters, she received from her husband, Tony. Maureen cherishes the inspiration and enthusiastic support for “the book” she received from her husband, Bill, and their three children, Erin, Colleen, and William. Each of us now understands why so many authors apologize to their families in the acknowledgments section.
Dr. Brenda L. Dietrich is an IBM Fellow and Vice President. She joined IBM in 1984 and has worked in the area now called analytics for her entire career. Her early work involved applying mathematical models to improve the performance of IBM manufacturing lines. During her career, she has worked with almost every IBM business unit and applied analytics to numerous IBM decision processes. For more than a decade, she led the Mathematical Sciences function in the IBM Research division, where she was responsible for both basic research on computational mathematics and for the development of novel applications of mathematics for both IBM and its clients. In addition to her work within IBM, she has been the president of INFORMS, the world’s largest professional society for operations research and management sciences, she is an INFORMS Fellow, and she has received multiple service awards from INFORMS. She has served on the board of trustees of SIAM and on several university advisory boards. She is a member of the National Academy of Engineering. She holds more than a dozen patents, has co-authored numerous publications, and frequently speaks on analytics at conferences. She holds a BS in mathematics from UNC and an MS and PhD in operations research/information engineering from Cornell. Her personal research includes manufacturing scheduling, services resource management, transportation logistics, integer programming, and combinatorial duality. She currently leads the emerging technologies team in the IBM Watson™ group.

Dr. Emily C. Plachy is a Distinguished Engineer in Business Analytics Transformation, responsible for leading an increased use of analytics across IBM. She has integrated data analysis into her work throughout her career. Since joining IBM in 1982, she has held a number of technical leadership roles including CTO, Process, Methods, and Tools in IBM Global Business
Services® (GBS), providing architecture and technology leadership and driving the adoption of consistent methods and tools in GBS, and CTO, Enterprise Integration, GBS, providing architecture and technology leadership. She has also held a variety of roles in IBM, including development, ad tech, research, emerging business opportunities, technical sales, and services. Her technology skills include data integration, enterprise integration, solution architecture, software development, and asset reuse. She has experience in multiple industries, including banking, consumer products, retail, telecommunications, healthcare, and petroleum. She has a BS degree in applied mathematics from Washington University, an MSc degree in computer science from the University of Waterloo, and a DSc degree in computer science from Washington University. In 1992, Emily was elected to the IBM Academy of Technology, a body of approximately 1,000 of IBM’s top technical leaders, and she served as its President from 2009 to 2011. She has been a long-term champion of women in technology. She is a member of Women in Technology International, the Society of Women Engineers, and INFORMS. Emily lives in New York with her husband, Tony. She is on Twitter @eplachy and on LinkedIn at http://www.linkedin.com/pub/emily-plachy/3/1bb/777.

Maureen Fitzgerald Norton, MBA, JD, is a Distinguished Market Intelligence Professional and Executive Program Manager in Business Analytics Transformation, responsible for driving the widespread use of analytics across IBM. She pioneered the development of an outcome-focused communications strategy to drive the culture change needed for analytics adoption. Maureen created analytics case studies and innovative learning exercises for teaching analytics. She co-created an innovative analytics workshop and taught MBA students in Europe and the Middle East. In her previous role, Maureen led project teams applying analytics to IBM Smarter Planet® initiatives in public safety, global social services, commerce, and merchandising, specializing in cost/benefit analysis and return on investment of analytic projects. Maureen became the first woman in IBM to earn the designation of Distinguished Market Intelligence Professional for developing innovative approaches to solving business issues and knowledge gaps through analysis. She has held a number of analytic and management roles in IBM. She earned BA and MBA degrees from the University of New Haven and a JD degree from the University of Connecticut School of Law. She is a licensed attorney and did her thesis on the legal implications of artificial intelligence. She lives in Connecticut with her husband, Dr. William Norton, and three children, Erin, Colleen, and William. She is a dual citizen of the United States and Ireland. In addition to Analytics Across the Enterprise,
Maureen has published “The Benefits of Social Media Analytics 2013” with the IBM Academy of Technology and “Social Media Analytics: Measuring Value Across Enterprises and Industries” in the Journal of Management Systems. Maureen is on Twitter @mfnorton and on LinkedIn at http://www.linkedin.com/in/maureennorton/.
Why Big Data and Analytics?

“The most competitive organizations are going to make sense of what they are observing fast enough to do something about it while they are still observing it.”

—Jeff Jonas, IBM Fellow and Chief Scientist, Context Computing, IBM Corporation

This is the story of how an iconic company founded more than a century ago, and once deemed a “dinosaur” that would not be able to survive the 1990s, has learned lesson after lesson about survival and transformation. The use of analytics to bring more science into the business decision process is a key underpinning of this survival and transformation. Now for the first time, the inside story of how analytics is being used across the IBM enterprise is being told. According to Ginni Rometty, Chairman, President, and Chief Executive Officer, IBM Corporation, “Analytics is forming the silver thread through the future of everything we do.” What is analytics? In simple terms, analytics is any mathematical or scientific method that augments data with the intent of providing new insight. With the nearly 1 trillion connected
objects and devices generating an estimated 2.5 billion gigabytes of new data each day, analytics can help discover insights in the data. That insight creates competitive advantage when used to inform actions and decisions. Data is becoming the world’s new natural resource, and learning how to use that resource is a game changer.

This book will help you chart your own course to using analytics as a smarter way of driving outcomes. To get the most value from analytics, start with the strategy you are executing and apply analytics to your most important business problems. If you have thought of analytics as only a technology, this book will change that. Analytics is not just a technology; it is a way of doing business. Through the use of analytics, insights from data can be created to augment the gut feelings and intuition that many decisions are based on today. Analytics does not replace human judgment or diminish the creative, innovative spirit but rather informs it with new insights to be weighed in the decision process. Michael Lewis, in his book *Moneyball: The Art of Winning an Unfair Game*, describes how even in baseball, which is rooted in statistics, analytics enabled the Oakland Athletics to assemble a competitive baseball team, despite paying the third-lowest salaries. Analytics for the sake of analytics will not get you far. To drive the most value, analytics should be applied to solving your most important business challenges and deployed widely. Analytics is a means, not an end. It is a way of thinking that leads to fact-based decision making.

“We believe that analytics is no longer an emerging field; today’s businesses will thrive only if they master the application of analytics to all forms of data. Whether your office is a scientific lab, a manufacturing company, an emergency room, a government agency, or a professional sports stadium, there is no industry left where an analytics-trained professional cannot make a positive impact,” says Brenda Dietrich, IBM Fellow and Vice President, Emerging Technologies, IBM Watson.

The intent of this book is to take some of the mystery out of how an organization can leverage big data and analytics to achieve its goals by giving current and future leaders a front-row seat to see how analytics was leveraged to transform IBM. Many consultants, academicians, and others have written eloquently on the topic of analytics, but the stories from within IBM as told by the people who learned lesson after lesson will give a real-world perspective on what works, what doesn’t work, and how you can either start or accelerate your own transformation journey.
IBM has been using what we now call analytics in manufacturing and product design since the late 1950s and in supply chain operations since the 1980s. A pivotal meeting took place in 2004 between Brenda Dietrich and Linda Sanford, then Vice President of Enterprise Transformation, IBM Corporation, when IBM expanded its use of analytics from physical applications, such as supply chain and manufacturing, to applications, such as sales and finance, that did not have processes with such obvious physical characteristics, and IBM’s enterprise-wide transformation journey to use analytics was launched.

In 2004, Dietrich led the Mathematical Sciences Department in IBM Research, a group that included a range of computational mathematics disciplines, including statistics, data mining, and operations research. Coincidentally, both Dietrich and Sanford received degrees in operations research, which is the practical application of math to real-world problems and was a precursor to much of what is now called business analytics. Sanford had seen the value of the mathematical methods developed in the Mathematical Sciences Department applied to IBM’s supply chain operations.

Sanford’s transformation team was looking for opportunities to build more analytics capability into IBM’s overall transformation. She knew they had to put measurable successes on the board early to create a sense of credibility for their work. Dietrich and Sanford discussed the IBM sales process and the simple, easily tracked metric annual revenue per IBM seller. The goal was to increase the numerator, to generate top-line growth for the company. They started with a small pilot program, working with sales representatives in the general business group in Canada. That initial pilot was able to use IBM internal data, along with publicly available data, to score sales opportunities. The immediate results were a higher-yield pipeline for the sellers and improved revenue per seller. More importantly, they proved the power of analytics to support growth and transformation.

IBM has been an avid consumer of analytic capabilities for the past decade. Use of analytics has spread from engineering-based processes, such as product design, through logistics processes, such as supply chain operations, to human-centric processes, such as sales and workforce management. Seeing the cultural shift in the receptiveness to the use of analytics has been amazing.
to see. When IBM started developing sales analytics tools, many sales leaders were skeptical about the value of such tools, believing that converting an opportunity into a sale was largely a function of the seller’s actions and could not be predicted in advance. But over the past decade, there has been a sea change in attitude. Now sales managers are asking for more analytics support so they can take their organizations to the next level of performance.

**Big Data and Analytics Demystified**

If analytics is any mathematical or scientific method that augments data with the intent of providing new insight, aren’t all data queries analytics? No. Analytics is often thought of as answering questions using data, but it involves more than simple data (or database) queries. Analytics involves the use of mathematical or scientific methods to generate insight from the data.

Analytics should be thought of as a progression of capabilities, starting with the well-known methods of business intelligence, and extending through more complex methods involving significant amounts of both mathematical modeling and computation. Reporting is the most widely used analytic capability. Reporting gathers data from multiple sources, such as business automation, and creates standard summarizations of the data. Visualizations are created to bring the data to life and make it easy to interpret. As a generic example, consider store sales data from a retail chain. The data is generated through the point of sale system by reading the product bar codes at checkout. Daily reports might include total store revenue for each store, revenue by department for each region, and national revenue for each stock-keeping unit (SKU). Weekly reports might include the same metrics, as well as comparisons to the previous week and comparisons to the same week in the previous calendar year. Many reporting systems also allow for expanding the summarized data into its component parts. This is particularly useful in understanding changes in the sums. For example, a regional store manager might want to examine the store-level detail that resulted in an increase in revenue from the home entertainment department. She would be interested in knowing whether sales increased at most of the stores in the region, or whether the increase in total sales resulted from a significant sales jump in just a few stores. She might also look at whether the increase could be traced back to just a few SKUs, such as an unusually popular movie or video game. If a likely cause of the sales increase can be identified, she might alert the store managers to monitor inventory of the popular products, reposition the products within a store, or even reallocate inventory of the products across stores in her region.
Descriptive and Predictive Analytics

Reporting, also known as descriptive analytics, is focused on reporting what has happened, analyzing contributing data to determine why it happened, and monitoring new data to determine what is happening now. Business intelligence (BI) software provides capabilities for descriptive analytics. BI helps enterprises understand how their organization is operating by giving them a clear picture of the recent past. The deployment of BI software also requires an enterprise to carefully think about its key performance metrics, to understand what it wants to measure and monitor, and to develop some process for exploring potential causes underlying changes in measurements. Sometimes it is obvious what should be measured. Other times it is less obvious, such as when someone discovers a leading indicator of revenue through analysis. Once these capabilities have been mastered, many organizations seek to look forward and get “headlights” on what will happen in the future. They turn to predictive analytics, which uses techniques such as statistics and data mining to analyze current and historical information to make predictions about what will happen in the future. Predictive analytics typically produces both a prediction of what will happen and a probability that the prediction will happen.

In many ways, the difference between descriptive analytics and predictive analytics is like the difference between a weather report and a weather forecast. Whereas a report describes what has happened, a forecast tells what is likely to happen and how likely it is to happen. An accurate prediction has greater business value, which is why considerable effort is applied to finding data that contains valuable signals about the future and developing analysis methods that can extract the signal effectively. In the past, performing predictive analytics had a reputation of requiring deep analytic skill. Today, modern tools have broadened the population of users who can leverage predictive analytics to augment decision making. No introduction to predictive analytics is complete without the caution that a prediction can be no better than the data that is used to make it. Thus incorrect data will likely lead to incorrect predictions, and events that have never been observed and captured in the data will never be predicted from analysis of that data.

Predicting what will happen based on the past can be quite useful. It can, for example, help a regional retail manager understand demand for a frozen dessert in the stores he manages as a function of the weather and the local competition. But, more importantly, it can also show him the relationship between past sales of this dessert and promotional pricing, coupons, and advertising. If he assumes that the same relationships will hold going forward, he can then estimate (or predict) future sales that will occur under
different pricing and advertising schedules. Predictive analytics that finds relationships between actions and outcomes is particularly useful.

**Prescriptive Analytics**

We use the term *prescriptive analytics* to cover analytics methods that recommend actions. In general, the goal is to find a set of actions that is predicted to produce the best possible outcome. To do this, you need to understand the relationship between actions and outcomes. In many cases, that relationship is clear and (more importantly) constant. If producing and distributing a newspaper circular costs 30 cents per copy, then the cost of distributing it to any specified number of customers is clear: 30 cents multiplied by the number of customers. However, the value, in terms of increased revenue, of the circular can only be inferred by looking at past data and, for example, comparing sales in weeks during which no circular was distributed to sales in weeks in which a circular was distributed. But the inferred relationship may be different in different towns, and it may vary by week of the year. That is, the computed value must be recalculated whenever new data becomes available. Despite the limitations, it seems clear that value can be derived through careful and appropriate use of predicted relationships to make decisions. Mathematical optimization has been used for decades to recommend decisions based on known, constant relationships between actions and outcomes. It is used extensively in supply chain and logistics decisions involving scheduling and allocation of resources. More recently, it has been used for decisions where some relationships are predicted from historical data rather than being based on physical limits (for example, transportation time) or business rules (for example, economic order quantities). Examples include setting prices based on predicted price elasticity, advertising based on predicted views of the ad and predicted sales lift per viewer, and targeted promotional offers (for example, coupons at checkout) based on customer segmentation.

**Social Media Analytics**

Analytics can also be applied to data that does not come from within an enterprise and to data that is not easily interpreted as transactions, such as data from Twitter. Several emerging areas within analytics are already providing business value. One area is *social media analytics*, which analyzes, or “listens,” to social media data to assess public opinion, or sentiment, on a variety of topics. Examples of social media include blogs, micro-blogs (such as Twitter), social networking (such as Facebook), and forums. It is possible to
mine social media for comments on a particular subject and analyze them for positive and negative sentiment, how people feel about a topic, or the “pulse” of a community related to a topic. A common way to communicate sentiment is to use a dashboard with views for volume trends over time, sentiment trends over time, and geographic distribution of sentiment. A frequent use of social media is to mine customer data to get feedback on products. Measuring the return on investment (ROI) of using analytics for social media can present a challenge. Value driver trees (that is, visualizations of the hierarchy of influences of different value drivers) have been used to measure the value of using social media analytics for a sports clothing manufacturer, a city government, and an automotive manufacturer, among other industries.

Entity Analytics

Another emerging area is entity analytics, which focuses on sorting through data and grouping together data that relates to the same entity. As a simple example of the power of entity analytics, consider three customer records, two of which have no data in common, and a third that has a driver’s license number which is the same as that of customer record one as well as a credit card number which is the same as customer record two. These three records can be combined into one record that has more complete data than each of the three individual records. Entity analytics is a powerful technique for recognizing context and detecting like and related entities across large collections of data. Jeff Jonas, IBM Fellow and Chief Scientist, Context Computing, contends that the data enterprises have to deal with is growing so fast that enterprises are developing amnesia; that is, using the same techniques to cleanse and analyze data causes them to get behind because the amount of data is increasing so fast. Jonas uses a puzzle as a metaphor for organizations’ need to sort through data to make sense of it and develop context; he says that an ever-growing pile of puzzle pieces represents the ever-growing amount of data, and until you try to assemble the pieces of the puzzle or data, you do not know what you are dealing with. When teaching MBA students about big data and analytics, Maureen Norton and Emily Plachy include an exercise where the students work enthusiastically to put together hundreds of puzzle pieces using multiple tables, shouting out insights as they discover them.

Cognitive Computing

Although entity analytics is helpful in finding relationships between pieces of data and can incorporate new data to either confirm or negate
previously found relationships, additional methods can be applied to garner insight from unstructured data. Cognitive computing, computing systems that interact with people in new ways to provide insight and advice, is emerging just when we need it to help us uncover insight from the explosion of big data. Chapter 11, “Reflections and a Look to the Future,” describes this exciting new era of computing.

Big Data

The most easily available source of data for analytics is an enterprise’s own internal transaction data. For our retail example, this includes inventory data, sales data, employee data, and promotion and advertising data. Increasingly, enterprises are augmenting their internal data with data from external sources, including social media data. Whereas enterprise transaction data tells the retailer what has been bought, social media data can give the retailer early insight into what customers intend to buy. With the adoption of social media tools such as Twitter and the growth of blogs and forums on the Internet, the amount of social media data is growing very large, and analyzing it is providing significant insights and benefits to businesses.

Big data has four dimensions, known as the four Vs:9

- **Volume**: The size of data, which can range from terabytes to petabytes of data
- **Variety**: The forms of data—structured, text, multimedia
- **Velocity**: The speed at which data is available and analysis of streaming data
- **Veracity**: Data quality—managing the reliability of data

Consumers who are active in the big data social media world are driving enterprises to create collaborative systems, known as systems of engagement.10 These new systems have led to the creation of engagement analytics to measure the value of engagement.11 Engagement analytics can be used to measure employee engagement and customer engagement. Systems of engagement and engagement analytics are covered in more detail in Chapter 5, “Enabling Analytics Through Information Technology.”

This book shows how IBM has solved a wide variety of business problems by leveraging analytics to elevate business results. The types of analytics described include predictive analytics, prescriptive analytics, social media analytics, and entity analytics. Some of the analytics is performed on big data. The use of analytics not only drives cost savings and revenue growth
but also provides more accurate and timely information to improve decision making and reduce complexity, which helps better manage the business. Analytics gives you the ability to anticipate, and that’s very powerful. So what does this mean for you? Whether you are in business for yourself or within a large company or a nonprofit or a government entity or a classroom preparing for your future, knowledge of the possibilities that analytics opens up will give you a competitive advantage. Understanding the journey that IBM has taken will shine a light on where you can get value from big data and analytics and illuminate your path to success in business.

Why Analytics Matters

“People respond to facts. Rational people will make rational decisions if you present them with the right data.”

—Linda Sanford, Senior Vice President, Enterprise Transformation, IBM Corporation

Quite simply, analytics matters because it works. You can be overwhelmed with data and the value of it may be unattainable until you apply analytics to create the insights. Human brains were not built to process the amounts of data that are today being generated through social media, sensors, and more. While gut instinct is often the basis for decisions, analytically informed intuition is what wins going forward.

Several studies have highlighted the value of analytics. Companies that use predictive analytics are outperforming those that do not by a factor of five. In a 2012 joint survey by the IBM Institute of Business Value and the Said Business School at the University of Oxford of more than 1,000 professionals around the world, 63% of respondents reported that the use of information (including big data and analytics) is creating a competitive advantage for their organizations. IBM depends on analytics to meet its business objectives and provide shareholder value. The bottom line is that analytics helps the bottom line. Your competition will not be waiting to take advantage of the new insights from big data. Should you?

IBM has approached the use of analytics with a spirit of innovation and a belief that analytics will illuminate insights in data that can help improve outcomes. The company hasn’t been afraid to make mistakes or redesign programs that haven’t worked as planned. Unlike traditional IT projects, most
analytics projects are exploratory. For example, the Development Expense Baseline Project explored innovative ways to determine development expense at a detailed level, thereby addressing a problem that many thought was impossible to solve. IBM analytic teams haven’t waited for perfect data to get started; rather, they have refined and improved their data along the way. For example, the Coverage Optimization with Profitability project team described in Chapter 9, “Increasing Sales Performance,” knew it had incomplete data, but rather than wait for the various data stewards to improve their data, the team jumped in and made progress incrementally on data governance and data cleansing. Using this approach will reduce your time to value. Using this approach will reduce your time to value. The key is to put a stake in the ground with a commitment that analytics will be woven into your strategy. That’s how IBM does it. This approach is also effective with big data. Rather than postpone the leveraging of big data, you should embrace it, establish a link between your business priorities and your information agenda, and apply analytics to become a smarter enterprise.

Governance

A majority of clients who have engaged with IBM to learn about the internal transformation efforts are most interested in the governance topic. How do you organize to take advantage of analytics? Where do you put the analytics group? Is it an IT function? Who leads analytics projects, and who is on the team? How do you set up your organization to be able to adapt processes to incorporate analytics? Interestingly, it is organizational obstacles—not data or financial concerns—that are roadblocks to adoption of big data and analytics; examples include not knowing how to use analytics to improve the performance of the enterprise and lack of bandwidth because of competing priorities. IBM’s approach has been very pragmatic and initially was quite focused in areas of the business that had the most challenges. Analytics was used as a means to address the most significant challenges first. There was a general notion that analytics could add value within IBM, but where it got very specific very fast was with large, critical problems in supply chain operations. At one point, supply chain problems were costing IBM millions of dollars per year. That story changed dramatically when using analytics become a way of doing business, and today IBM’s supply chain is world class.

IBM’s transformation to use analytics is part of a larger enterprise transformation that began in 1993 to transform its business processes. As part of this
enterprise transformation, IBM’s organization evolved to incorporate Value Services, defined as a group of functional units, processes, and initiatives dedicated to working collaboratively to improve productivity and effectiveness through business transformation.¹⁵

1. **Globally Integrated Enterprise Shared Services:** To support this transformation, globally integrated organizational units providing support services to all of IBM were formed.¹⁶ Four of the functional areas described in the upcoming chapters are Globally Integrated Enterprise Shared Services: human resources, integrated supply chain finance, information technology, and marketing.

2. **Enterprise Transformation Initiatives:** A number of enterprise-wide initiatives were launched to drive radical, innovative transformation in the way IBM works with clients, business partners, and its own employees. Three Enterprise Transformation Initiatives, which are described in later chapters, are Development, Smarter Commerce™ Inside IBM, and Hardware Product Management Transformation.

Since they provide support services to all of IBM or drive radical, innovative transformation, Globally Integrated Enterprise Shared Services and Enterprise Transformation Initiatives are control points for leveraging analytics. For example, when Finance creates and deploys an analytic solution to predict spending, all of IBM’s business units reap the benefits.

The next evolution of IBM’s transformation is to migrate from a globally integrated enterprise to a smarter enterprise by optimizing the entire enterprise with the following technologies:¹⁷

- **Analytics** to gain business insight for customers and the enterprise
- **Social media** for business collaboration both inside and outside the enterprise
- **Mobile communications** for pervasive connectivity
- **Cloud technologies** for IT enablement

IBM’s transformation to a smarter enterprise is described in “Creating a Smarter Enterprise: The Science of Transformation.”¹⁸ IBM’s transformation to use analytics enterprise-wide, which began in 2004, continues; today, analytics is complemented with social, mobile, and cloud.

Many people are surprised to learn that at IBM, analytics was not centralized and not driven out of IT. Analytics is mostly thought of as a technology,
and many expect technology projects to be owned by IT, but because analytics is a way of doing business, it needed to be close to the business, woven like a silver thread into the fabric of all of the business processes. The focus was on how to become smarter and more agile with the use of analytics to solve business problems; being close to those problems was required. Business analysts partner with analytics practitioners and in some cases used what IBM refers to as the “secret sauce” for analytics—IBM Research, which is a unique and differentiating function. Few companies have a 400-person math department to draw on. What does this mean for other companies? IBM has leveraged its math department both to apply analytics internally and to add some of the learnings and benefits to its analytics products and solutions. So you can get the benefit of a large math department without having to have your own.

Proven Approaches

Staying focused on solving business problems was the pragmatic start, and the other crucial element was having very high-level executive support from the beginning. From a governance perspective, those are two key levers to drive value: focus on actions and decisions that will generate value and have high-level executive sponsorship.

The ideal team to do analytics is a collaboration between an experienced data scientist, a person steeped in the area of the business where the challenge needs to be solved, and an IT person with expertise in the data in that particular area of the business.

A joint study by MIT Sloan and the IBM Institute for Business Value developed several recommendations. The first is that you start with your biggest and highest-value business challenge. The next recommendation is to ask a lot of questions about that challenge in order to understand what’s going on or what could be going on. Then you go out and look for what data you might have that’s relevant to that challenge. Finally, you determine which analytic technique can be used to analyze the data and solve the problem.

Because most companies have constraints on the amount of money and skills available for projects, estimating the ROI can provide a better differentiator for selecting the project with the highest potential impact than relying on instincts. Estimating an analytics project’s ROI involves both capturing the project costs and measuring the value. As mentioned earlier in this chapter, value driver trees are an effective technique for measuring value.
Analytics changes the way you approach your business and becomes an integral part of the way you manage and transform your business.

**Gauging Progress**

Once you’ve started solving business problems using big data and analytics, how do you know if your capabilities are progressing? IBM developed the Analytics Quotient (AQ) so that organizations can measure their maturity in adopting big data and analytics and set goals for enhanced adoption. Based on answers to approximately 15 questions, organizations can find out if they are novices, builders, leaders, or masters.

In 2013, the IBM Institute of Business Value published results from a study focused on how to convert insights from big data and analytics into results. More than 900 business and IT executives were surveyed, and through research, nine levers were identified that distinguish leaders who are able to realize value from big data and analytics from those who are not. As described in the report, the nine levers are:

- **Source of Value**: Decisions that generate value
- **Measurement**: Business outcome measurement
- **Platform**: Integrated hardware and software capabilities
- **Culture**: The availability and use of data and analytics within an organization
- **Data**: Formal processes for data governance and security
- **Trust**: Confidence within the organization
- **Sponsorship**: Support and involvement of executives
- **Funding**: A rigorous analytics funding process
- **Expertise**: Development of and access to data and analytics skills

The authors found a strong link between organizations that excel in these nine levers and organizations that are deriving the greatest value from data and analytics. Further, they found that the levers do not impact the creation of value in the same way, and they identified a progression of three steps—**Enable, Drive, and Amplify**—each with three of the levers (see Figure 1-1):

- **Enable** forms the foundation for creating value from big data and analytics. The foundation is actions and decisions that generate value, measuring outcomes and providing a platform for big data and analytics activities.
Drive has the actions needed to create value by moving from analytics discovery to value creation, which is aided by having an analytics and big data culture, having data governance and data security, and creating trust.

Amplify increases the amount of value realized by providing momentum to translate insights into actions that increase an organization’s bottom line. This is done through sharing a common vision, managing and monitoring analytic investments, and knowledge-sharing opportunities.

As you start your journey to leverage big data and analytics for business value, start by leveraging the three levers in Enable—Source of Value, Measurement, and Platform—and then move to Drive and then finally to Amplify.

Overview of Nine Journeys

IBM has many business functions. Some of them are generic functions—including human resources, finance, supply chain, sales, information technology, marketing, and services—that can be found in most enterprises.
Other functions—such as software development and hardware manufacturing—are more specific to a technology company, although analogous functions exist in other industries (for example, manufacturing cars in the automotive industry).

This book contains 31 case studies of how nine business functions have incorporated analytics to change the way they do business and to improve their business results. Each business unit’s story is told as a separate chapter, beginning with an overview of the unit’s journey to improve its business results by leveraging analytics, including the pitfalls and lessons learned, followed by a more detailed description of one or more significant analytics projects within that business unit. The nine business functions started their analytics journey at different times, and they’re now at different stages; they also used different approaches. Each journey is different, though we do see some common themes.

Some business units have been on long journeys, others are just starting their journeys, and others are in between. All of the business units have a history of using descriptive analytics or business intelligence. This book concentrates on predictive and prescriptive analytics and newer forms of analytics, such as social media analytics and entity analytics.

IBM’s supply chain organization started its journey the earliest and has numerous analytics solutions. You will learn how the supply chain organization is using analytics to reduce expenses and to predict quality problems before there is an impact. The supply chain organization is also using social media analytics to predict supply disruptions based on events around the world. The finance organization also has a rich history of using analytics. Examples include using analytics to reduce financial risk and to reduce the risk of an acquisition failing to meet objectives. IBM’s human resources (HR) organization started using analytics more recently and is using predictive analytics to proactively address retention and is using social analytics, big data, and sentiment analysis to take the “pulse” of what employees are thinking about various issues, such as a new HR program. IBM’s information technology (IT) organization has developed a number of applications that leverage analytics and big data, such as how to find an employee and how to answer questions about products and services from the sales force.

**Emerging Themes**

You will notice some common themes in the nine IBM journeys described in this book.
Relationships inferred from data today may not be present in data collected tomorrow. The relationships that you infer from data about the past do not necessarily hold in data that you collect tomorrow. You cannot analyze data once and then make decisions forever based on old analysis. It’s important to continually analyze data to verify that previously detected relationships are still valid and to discover new ones. Fortunately, major discontinuities with data do not happen very often, so change generally happens gradually. Social media sentiment, however, has a much shorter half-life than most data. Using relationships derived from past data has been repeatedly demonstrated to work better than assuming that no relationships exist. The relationships that have been detected are likely correlation rather than causality. However, these relationships, if detected and acted upon quickly, may provide at least a temporary business advantage.

You don’t have to understand analytics technology to derive value from it. For a long time, many business leaders expressed the opinion that mathematics should be used by only those who understood the details of the computations. However, in recent years this view has been changing, and analytics is being treated like other technologies. You must learn how to use it effectively, but it is not necessary to understand the inner workings in order to apply analytics to business decisions. You have to apply analytics methods in the context of the problem that is being solved and make the results accessible to the end user. But just as the user of a car navigation system does not need to understand the details of the routing algorithm, the end user of analytics does not have to understand the details of the math. Typically, making the results accessible to the end user involves wrapping the math in the language and the process of the end user. Also, the analytics can be embedded deep inside things so that the user does not see it, like in supply chain operations. Analytics should be usable by anyone, not just those with PhDs in statistics or operations research. Some users will want to understand the algorithms and inner workings of an analytics model in order to trust the results prior to adoption, but they are the exception. Chapter 4, “Anticipating the Financial Future,” illustrates such a case.

Fast, cheap processors and cheap storage make analysis on big data possible. Moore’s law has resulted in vast increases in computing power and vast decreases in the cost of storing and accessing data. With readily available and inexpensive computing, we can do what-if calculations often and test a number of variables in big data for correlation.

Doing things fast is almost always better than doing things perfectly. Often inexact but fast approaches produce enormous gains because they result in better choices than humans would have made without the use of analytics. Over
time, the approximate analytics methods can be refined and improved to achieve additional gains. However, for many business processes, there is eventually a point of diminishing returns: The calculations may become more detailed and precise, but the end results are no more accurate or valuable.

Using analytics leads to better auditability and accountability. With the use of analytics, the decision-making process becomes more structured and repeatable, and a decision becomes less dependent on the individual making the decision. When you change which people are in various positions, things still happen in the same way. You can often go back and find out what analysis was used and why a decision was made.

How to Use This Book

We have organized this book so you can choose your best path for navigating the content. The next nine chapters describe how IBM has applied analytics to address challenges in nine different business functions. Some may choose to read the chapters sequentially. Others can instead start with the chapters that are of the most interest to them.

This book can also be used as a reference. The appendix includes a table of the 31 case studies described in this book, including the challenges and outcomes, along with the type of data and analytics techniques used to achieve the outcomes. Using the table, you can map from a particular analytics technique to a business challenge and then map to a chapter and page that describes the challenge. For example, if social media analytics is of interest, the table shows that Chapter 2, “Creating a Smarter Workforce,” describes how IBM’s HR organization uses social media analytics to gain an accurate view of what employees are thinking and that Chapter 3, “Optimizing the Supply Chain,” describes how the supply chain organization uses social media analytics to predict disruptions in the supply chain. You can also examine the table to see if the business challenge you are facing is similar to one in the table.

Analytics Across the Enterprise can be used as a text for or a complement to the textbooks for MBA or undergraduate classes with analytics content as it provides real-world examples of using analytics to transform business areas and improve results. We chose nine as the number of business area stories to include so that these nine chapters, along with this chapter and Chapter 11 would fit into a semester-long course.

This book describes how nine different organizations are using analytics as a way of doing business and how they are realizing business value from data and analytics. Throughout this book, you will learn about the business problems selected, the pitfalls encountered, the business value that can be
obtained by using big data and analytics, and the many lessons the teams learned along the way.

Endnotes

8. Ibid.


18. Ibid.


24. Ibid., page 5.

25. Ibid., page 6.
Index

A
Abramatic, Jean-François, 97, 100-102
Accelerated External Reporting, 58
accountability, 17, 65
accounts
  coverage by investment, 128-130
  maximum revenue growth by, 124-126
accounts receivable, 36, 41-43, 47
Accounts Receivable—Next Best Action, 36, 42, 47
accuracy of sentiment analysis, 29
acquisition strategies, 62-64
actions, marketing, 90
activity, 76
adoption, 40, 46
AER (Accelerated External Reporting), 58
agendas, information, 73-74
aggregating data, 99
alerts, 157
aligning incentives, 46
allocation of expenses, 99-105
Amplify, 13
Analytic Ambassador community, 154
analytics, 11
  applying, 67-70
  capabilities, 3
  current state of, 153
  alerts, 157
  forecasting, 158-159
  simulation, 156
  transactional data, 155
  definition of, 1, 4
  descriptive, 5
  future state of, 160
  cognitive computing, 163
  growth of data, 160
  unstructured data, 161-163
  leveraging, 122-125, 139-141
  predictive, 5
  prescriptive, 6
  social, 26-29
  supply chains, applying to, 33-36
  use cases, 166-173
  value of, 9
  workforces, applying to, 21, 24-25
Analytics Framework, 147-148
Analytics Quotient, 13
AnalyticsZone, 154
anticipating the future. See also predicting
balancing risk/rewards, 59-61
creating cultures, 53-55
enabling financial value, 51-52
Finance transformation, 52
managing efficiency, 55-59
validating acquisition strategies, 62-64
Application Developers, 103
Application Management Services, 140
applications
availability, 70
development, 71-73
applying
alerts, 157
analytics, 67-69
to manufacturing/product management, 107-108
moderizing servers, 69-70
to supply chains, 33-36
to workforces, 21, 24-25
box plots, 70
forecasting, 158-159
simulation, 156
transactional data, 155
approaches (proven), 12
AQ (Analytics Quotient), 13
AR (accounts receivable), 36, 41-43, 47
auditability, 17, 65
automating marketing, 89
availability of applications, 70
awards, 41
CRN Channel Champion award in 2010, 41
Leading Innovator Award, 39
Tech Data 2010 Inventory Optimization Partner of the Year, 41

B
B2B (business-to-business), 81, 121, 132-135
B2C (business-to-consumer), 81, 86, 121
balancing risk/rewards, 59, 61
Baseman, Robert J., 107, 111, 113
behavior, 82
behavioral analytics, 85
BI (business intelligence), 5, 58
big data, 8
enabling, 67-69
use cases, 166-173
blogs, 6
Blue Pages, 103
box plots, 70
BPS (Business Performance Services), 128
Bradford, Peter, 102
brands, optimizing value, 38
Bush, David E., 121, 131-132
business cases, building, 123
business intelligence, 5, 58
Business Partner organization, 39
Business Performance Services, 128
Business Process Services, 141
business-to-business, 81, 121, 132-135
business-to-consumer, 81, 86, 121
buy-in, 46
calculation of confidence intervals, 157
Callahan, Matt, 126
Campbell, Murray, 23
cash processes, 34
CCHs (client collaboration hubs), 163
CDM (Cognos Disclosure Management), 58
CFO (chief financial officer), 131
charts, Gantt, 110
chief financial officer, 131
Chief Human Resources Officer (CHRO), 24
chief information officers, 67-68, 83, 131
chief marketing officers, 73, 84
chief procurement officers, 123
CIO magazine, 61
CMOs (chief marketing officers), 67-68, 83, 131
collaboration hubs, 163
clients, 81-82, 85
data foundation development, 85-87
early problem warnings, 147-148
effects of marketing actions, 90
IBM digital strategy, 92-93
performance management, 87-89
sales, 35
cloud technologies, 11
CMOs (chief marketing officers), 73, 84
marketing, 90
performance management, 87-89
services, 141-142
social media, 73
Development Enterprise Transformation Initiative, 98, 101
Development Expense Baseline Project, 10, 99, 104
Development Productivity Indicators Project, 101
devices, testing, 108
dicing wafers, 109. See also semiconductors
Dietrich, Brenda, 2-3, 93, 111
digital strategies, 92-93
Dillon, Greg, 148
directories, Blue Pages, 103
disruptions, predicting, 43-45
diversity of teams, 93
Dollard, Cary, 115
DOS (days of supply), 40
Dow, Doug, 65, 97
Drive, 13
Dun & Bradstreet, 125
Dunn, Melody, 87
early problem warnings, 147-148
education, 24
Edwards, Ben, 81, 84
effects of marketing actions, 90
efficiencies, B2B solutions, 132-135
efficiency
managing, 55-59
marketing, 88
eminence, 76
EMM (IBM Enterprise Marketing Management) Automation Project, 88
employees
insights, 27
retaining, 25
retention, 58
social analytics, 26-29
enable, 30
Enable, 13
enabling
big data, 67, 69
decision making, 99-105
financial value, 51-52
balancing risk/rewards, 59-61
creating cultures, 53-55
managing efficiency, 55-59
validating acquisition strategies, 62-64
signature client experiences, 85-87
transformation, 68-77
engagement analytics, 75
Enhanced Data Mining, 111
Enterprise Social Pulse, 26-29
Enterprise Transformation Initiatives, 11, 98, 115, 123
entity analytics, 7
Essential CIO, The: Insights from the Global Chief Information Officer Study, 67
ETIs (Enterprise Transformation Initiatives), 115, 123
Ettl, Markus, 47
events, reducing time to detect aberrant, 113-114
evolution of roles, ISC, 34
expand mandate, 67
expenses, development of, 99-105
Expertise, 13
Fab PowerOps, 110
fabrication facilities, 109-111
Facebook, 6
Faces, 72. See also applications
faster client response times, 147
Ferrar, Jonathon, 24, 29-30
Finance Leadership Advocacy Group, 54
Finance transformation, 52
financial value, enabling, 51-52
balancing risk/rewards, 59, 61
creating cultures, 53, 55
managing efficiency, 55-59
validating acquisition strategies, 62, 64
first in, first out rule, 109
FLAG (Finance Leadership Advocacy Group), 54
Fleming, Martin, 123
Forbes Insight, 84
forecasting, 5, 57, 158-159
four in the box purchasing models, 131
FPO (Fab PowerOps), 110
France, SWG, 128
Franz Edelman Award, 123
Funding, 13
funding models, 30
future
  anticipating
    balancing risk/rewards, 59-61
  creating culture, 53-55
  enabling financial value, 51-52
  Finance transformation, 52
  managing efficiency, 55-59
  validating acquisition strategies, 62-64
of Finance, 64
  state of analytics, 160
  cognitive computing, 163
  growth of data, 160
  unstructured data, 161-163

G
GAAP (Generally Accepted Accounting Principles), 58
Gantt charts, 110
GBS (Global Business Services), 140, 147
Generally Accepted Accounting Principles, 58
George, Bill, 101
Global Business Services, 140, 147
Global Delivery Excellence, 148
Global Technology Services, 140
Globally Integrated Enterprise Shared Services, 11
governance, 10-12, 46, 73-74
growth, 3
  acquisition strategies, 62-64
  data, 160
  maximum revenue, 124-126
  retaining resources, 25
GTS (Global Technology Services), 140
high-value resources, retaining, 25
Hill, David, 35
hiring, market-related analytics, 84
holistic view of development expense, 99-105
Horan, Jeanette, 67, 73
HPMT (Hardware Product Management Transformation), 115-116
HR (human resources), 15, 99-100
hubs, 163
Hugo, Victor, 159
human resources, 15, 99-100

I
iBAT (IBM Buy Analysis Tool), 36-40, 47
IBM Enterprise Marketing Management (EMM) Automation Project, 88
IBM
  Global Business Services, 140-141, 143-148
  Global Technology Services, 140-143, 145
  ILOG, 110-111
  Institute of Business Value, 9, 12-13
  QRadar Security Intelligence Platform, 71
  Research, 22, 39
  SPSS Modeler, 104
  IBV (Institute for Business Value), 131
  IFRS (International Finance Reporting Standards), 58
ILOG, 110-111
  implementation, 35
  incentives, 46
  incidents, detecting security, 71
  information. See also data
  agenda, 73-74
  sharing, 163
  Information Technology Services, 141
  information technology. See IT
  Information Week, 39
  infrastructures, 76
infusion, 24
inside sales, 130-131. See also sales performance
insights, employees, 27
Institute for Business Value, 131
Institute for Supply Management, 39
integer programming, 160
Integrated Enterprise Operations Management, 47
Integrated Supply Chain, 33-34, 36
Intellectual Property Licensing, 154

Index
International Finance Reporting Standards, 58
intuition, 9
inventory, managing, 39-41
investments, optimal sales coverage by accounts, 128-130
invoices, segmentation, 42
ISC (Integrated Supply Chain), 33-34, 36
ISM (Institute for Supply Management), 39
IT (information technology), 15
detecting security incidents, 71
enabling, 67-70
transformation, 71, 74, 77

J–K
Jeopardy!, 123, 163
Jonas, Jeff, 1, 7
journeys
nine, 14
themes, 15-17
Kadochnikov, Nick, 97-98, 102
Karsan, Rudy, 23-24
Kavanaugh, James, 51, 54
Kenexa, 23-24
KPIs (key performance indicators), 75

L
Leading Innovator Award, 39
leverage, 30
analytics, 122-123
leveraging the levers, 66
mandate, 67
the nine levers of differentiation, 47
services, 139-141
Lewis, Michael, 2
linear programming, 160
Long-Term Signings, 141-142
Loughridge, Mark, 55
ETS (Long-Term Signings), 141
Lupushor, Stela, 29

M
M&C Labs, 84
MacDonald, Randy, 21, 24, 26, 30
maintenance of heavy equipment, 157
managing, 22
efficiency, 55-56, 58-59
inventory, 39-41
optimizing, 98
performance, 87-89
products, 107-108
Manganaris, Stefanos, 90
manufacturing
applying analytics to, 107-108
enhancing yield, 111-113
reducing time to detect aberrant events, 113-114
scheduling processes in semiconductor fabrication facilities, 109-111
simplifying portfolios, 115-116
MAP (Market Alignment Program), 122-126
Market Alignment Program, 122-126
marketing
actions, 90
automating, 89
efficiency, 88
performance management, 87-89
Markov Decision Process, 42
mathematical optimization, 160
Mathematical Sciences Department in IBM Research, 3
Mauri, Ross, 36, 93
maximum growth revenue, 124-126
MDP (Markov Decision Process), 42
Measurement, 13
measurements
confidence, 157
development expenses, 99-105
hard, 29
leveraging, 30
progress, 13
of ROI, 25
skilled workforces, 97-98
soft, 29
Mergers and Acquisitions Analytics project, 62, 66
methods, forecasting, 158-159
Meyerson, Bernard, 111
micro-blogs, 6
Microelectronics Division and ILOG, 109
microprocessors, 112
mining, data, 111
MIT Sloan, 12
mobile communications, 11
models, simulation, 156
modernizing servers, 69-70
Moneyball: The Art of Winning an Unfair Game, 2
monitoring social media, 43-45
Monte Carlo simulation, 69
Moore, Geoffrey, 75
multi-channel, 86

N
NASA, 158
NBA (Next Best Action), 36, 42, 47, 82
nearest to completion first rule, 109
networks, 76
new business in services, developing, 141-142
Next Best Action, 36, 42, 47
nine journeys, 14-17
Norton, Maureen, 7, 154

O
O’Sullivan, Fran, 34, 42, 48
off-line analyses, 113
omni-channel, 86
OMT (Optimal Matching Technology), 145-146
online commerce, 130-131
OnTarget, 122
opportunity to order, 34
Optimal Matching Technology, 145-146
optimizing
manufacturing
applying analytics to, 107-108
enhancing yield, 111-113
reducing time to detect aberrant events, 113-114
scheduling processes in semiconductor fabrication facilities, 109, 111
simplifying portfolios, 115-116
mathematical optimization, 160
performance, 143, 146-147
productivity, 38
sales performance, 121-124
B2B solutions, 132-135
coverage by investment, 128-130
deploying sellers, 124-128
online commerce, 130-131
supply chains
applying to analytics, 33-36
AR processes, 41-43
detecting quality problems early, 36-38
managing inventory, 39-41
Supply Chain Listening project, 43-45
workforces, 97-98
Otto, Nick, 129
outcomes
client-focused business, 133
deployment of financial risk analytics, 143
Development Expense Baseline Project, 105
productivity, 130, 147
reduction of hardware product portfolios, 116
revenue, 130
sales performance, 126
semiconductor fabrication processes, 111
signings, 142
territory performance, 127
timely intelligence to delivery teams, 148
outsourcing, 141

P
Palmisano, Sam, 100
partnerships, 25
PASIR (Predictive Analytics for Server Incident Reduction), 69
Passi, Carlos, 54
performance, 154. See also optimizing
management, 87-89
sales, 121. See also sales performance
workforce, 143, 146-147
pioneer mandate, 68
pipeline, increasing, 142
Plachy, Emily, 7, 154
Platform, 13
platforms, 73, 77
portfolios, simplifying product, 115-116
power outages, 44
predicting
alerts, 157
disruptions, 43-45
risk, 142-145
predictive analytics, 5
Predictive Analytics for Server Incident Reduction, 69
preference data, 82
prescriptive analytics, 6
preventive maintenance, 158
Price, Paul, 62
Problems, early warnings, 147-148
processes, 65
AR, 41-43
cash, 34
fabrication of semiconductors, 109-111
product management, analytics
applying to, 107-108
enhancing yield, 111-113
reducing time to detect aberrant events, 113-114
scheduling processes in semiconductor fabrication facilities, 109-111
simplifying portfolios, 115-116
production, reducing times, 111
productivity, 130, 147, 163
collectors, 41-43
optimizing, 38
Professional Development Tool, 143
Professional Marketplace, 143
profitability, 22, 142
programming, 160
progress measurements, 13
projects
design, 35
Development Expense Baseline Project, 99, 104
Development Productivity Indicators Project, 101
Worldwide Spend, 55-56
protecting data about employees, 100
proven approaches, 12
PureSystems, 128
push-down communication, 163

Q–R
QEWS (Quality Early Warning System), 36-37, 47
QRadar, 71
qualitative data, 82
quality problems, detecting early, 36-38
quantitative data, 82
reactions, 76
readiness for change, 46
real estate management, 98
Real Estate Planning and Facility Management, 154
recruitment, 21
reduction
of returns, 41
production times, 111
time to detect aberrant events, 113-114
refresh servers, 70
relationships, 30
graphs, 162
replenishment, 39
reports, 5. See also descriptive analytics
Corporate Executive Board Sales Leadership, 122
Texas, 59
Research division, 154
Resource Analytics Hub, 144
resources, retaining, 25
retention, employees, 58
return on investment. See ROI
returns, reducing, 41
revenue, 142
maximum growth, 124-126
outcomes, 130
tracking, 103
rewards, 59-61
risks, 59-61
Country Financial Risk Scorecard, 59-61
predicting, 142-143
Rogers, Maria, 132
ROI (return on investment), 7, 12, 99
measurement of, 25
roles, 22
CIOs, 68
evolution of ISC, 34
Rometty, Ginni, 1, 82
rules, manufacturing, 109

S
Said Business School at the University of Oxford, 9
Sales Coverage and Transformation, 126
sales organizations, leveraging analytics, 122-123
sales performance
optimizing, 121-124
B2B solutions, 132-135
coverage by investment, 128-130
deploying sellers, 124-128
online commerce, 130-131
sales, general, and administrative, 128
Sanford, Linda, 3, 9
scheduling processes in semiconductor fabrication facilities, 109-111
SCIP (Strategy and Change Internal Practice), 132
security, 71-74
SEE (Smarter Enterprise Enablement), 64
segmenting invoices, 42
Sponsorship, 13
SPSS, 159
Spugani, Patricia, 131-132
SSCA (Smarter Supply Chain Analytics), 34, 46
Statistical Process Control, 37
statistics, 2
statutory environments, 59
STG (Systems and Technology Group), 39
stock-keeping unit, 4
Strategic Outsourcing Services, 141
strategies
acquisitions, 62-64
digital, 92-93
development, 35
invoice segmentation, 42
Strategy and Change Internal Practice, 132
strikes, 44
success, Mergers and Acquisitions
Analytics project, 63
Supply Chain Listening project, 43-45
Supply Chain Social Listening, 36
supply chains
analytics, 33-36
AR processes, 41-43
managing inventory, 39-41
quality problems, 36-38
simulation models, 156
Supply Chain Listening project, 43-45
supply demand visibility, 39-41
SWG (Software group), 128
Switzerland, 104
systematic cross-correlation of security data, 71
Systems and Technology Group, 39
systems
of engagement, 8, 75
of record, 75
T
talent analytics, 21. See also workforces
taxes, reporting, 59
teams
development, 103
diversity of, 93
Tech Data 2010 Inventory Optimization Partner of the Year award, 41
telesales, 130-131
validating acquisition strategies, 62-64

value
of actions taken, 30
of analytics, 9
brands, 38
financial
balancing risk/rewards, 59-61
creating cultures, 53-55
enabling, 51-52
managing efficiency, 55-59
validating acquisition strategies, 62-64

Value Services, 11
variability, 157
variety, 8, 28, 142
velocity, 8, 28, 37, 112
veracity, 8
video conferences, 54
visibility, tracking, 43
volume, 8, 28, 37, 39, 72, 112, 142
Volume and Velocity, 71

W–Z

wafers, 109. See also semiconductors
Wallace, Marie, 75
warnings, early client problems, 147-148
Watson group, 164
Watson Jeopardy!, 72
Watson Sales Assistant, 72, 123, 164
Western Electric, 37
Wong, Chris, 82, 85, 87
Workforce Optimas Award, 147
workforces. See also employees
analytics, 21, 24-25
management, 98
optimizing, 97-98
performance, 143, 146-147
retaining resources, 25
social analytics, 26-29
Worldwide Spend project, 55-56

Yashchin, Emmanuel, 36
yield, enhancing, 111-113